

BRIEFING PAPER

“Invest in NZ Showcase”

US Business Case & Launch

<https://nZRural.farm/showcase>

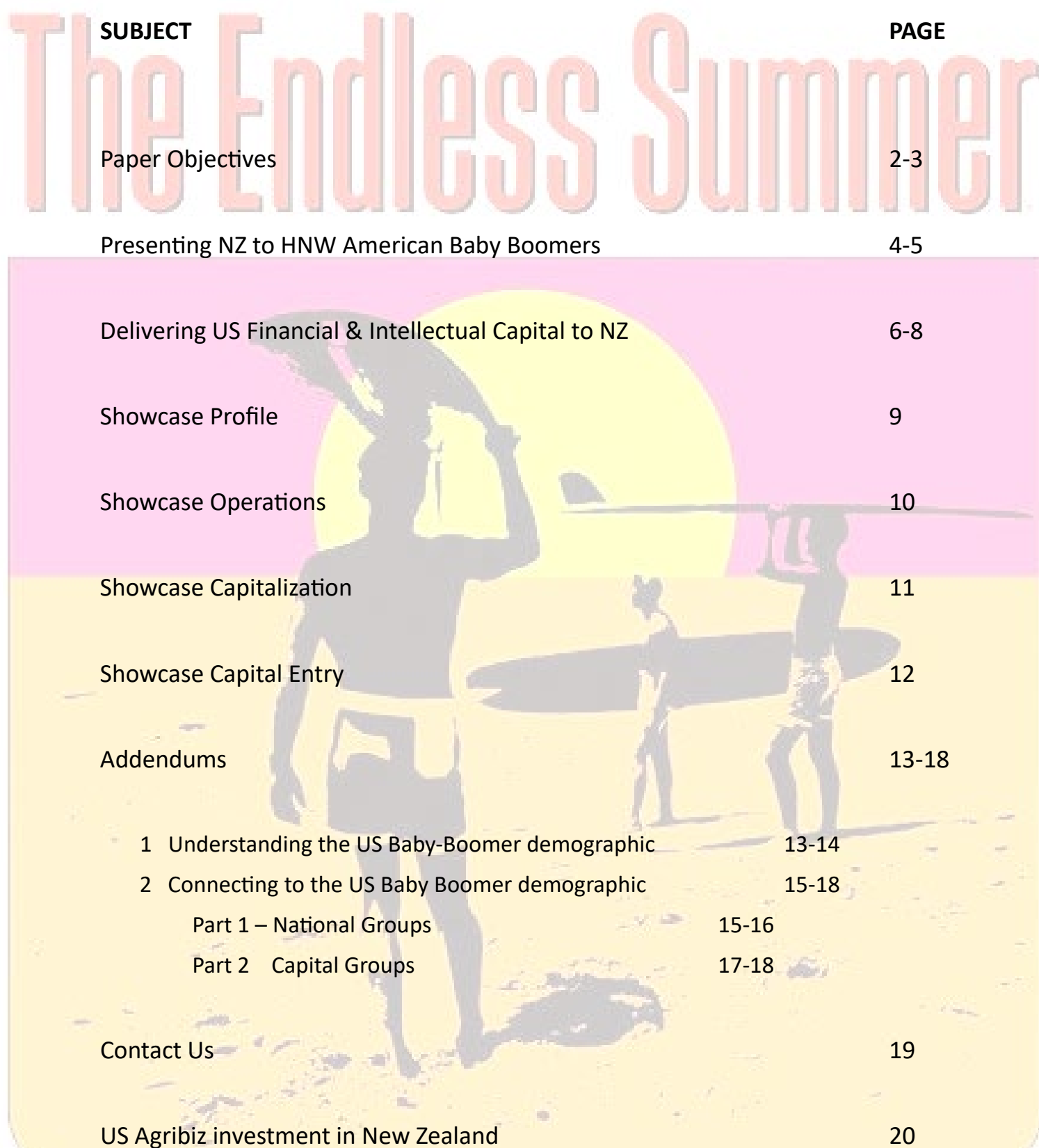


Our Licensing Agreement with Bruce Brown Films LLC in CA permits presenting NZ investment packages to the High Net Worth, (HNW) American Baby Boom generation for whom this imagery is nostalgically evocative. Memorably differentiating Northland as an investment destination for US investors seeking Residency-By-Investment in NZ.



“Increasing exposure for NZ Emerging Growth Companies seeking US capital”.

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OBJECTIVE OF THIS PAPER

INVEST IN NZ

To present the case for opening and operating a permanent [“Invest in NZ”](#) Showcase in Ft Lauderdale, FL that seeks to deliver to American HNW Baby-Boomers **“Endless Summers”** by investing in NZ through “Residency-By-Investment”.

- A Showcase that through the promotional use of the nostalgically evocative imagery of the iconic 1960’s movie, **“The Endless Summer”** attracts the attention of High Net Worth American Baby-Boomers to **“sanctuary invest”** in New Zealand “lifestyle” real estate assets and Emerging Growth Companies, (“EGC”). Investments that will open the door to permanent “Residency-By-Investment”.
- Such residency creating the platform upon which an intergenerational, year-round **“Endless Summer”** can be enjoyed by Baby Boomers and their families by catching the northern / southern hemisphere summers each year. Year by year. Every year.

A **licensing agreement** permitting use of “The Endless Summer” imagery has been signed between the Showcase operating company, NZ Showcase USA Inc and Bruce Brown Films LLC of CA, owners of the intellectual property rights to “The Endless Summer” imagery.

NZ INVESTMENT INTEREST

“Test the Waters”

A USD5M “Agribiz Sanctuary Plus” (“ASP”) investment package presented via a 90 day expression of interest “Test-the-Waters” campaign in early 2024 showed strong interest with inquiries from 103 “walk-ins” totalling USD515M / NZD850M. Overwhelmingly from the older demographic. Indicatively, the Baby-Boomer generation.

NZ “ASP” INVESTMENT PACKAGE

Pitched at **USD5M / NZD8.3M**, this template comprised the two following components:

- Residency-By-Investment:** **NZD5M (circa USD3M)** The direct investment required to be made into a NZ owned company to gain Residency-By-Investment under the investor-visa program.
- Residence:** **NZD3.3M (circa USD2M)**. As “sanctuary” seeking US baby boomer investors typically prefer the peace of a rural setting, this sum would be sufficient to invest in either **(a)** a beautiful **house and land package** in rural NZ or **(b)** a small, income producing, **lifestyle orchard** with residence not exceeding 5ha in size. This land area not requiring Overseas Investment Office (OIO) consent for sale to a foreigner.

INVESTMENT TIMEFRAME

Allow 3-6 months for tyre-kicking. Provided no regulatory consents are required, allow another 3-6 months to investment closing and the rising of an **“Endless Summer”**.

C'mon New Zealand—Let's deliver **“Endless Summers”**—for ever!

Sure, we may be the third most expensive “Golden Visa” country in the world!

But as the world's safest country we have an *“exciting investment korero!”*

So let's tell the world that New Zealand is a **“Great Place to Be”**

Especially HNW American Baby-Boomers who know us.

And ready to spend **“Endless Summers”** here!

With the capital to make it happen!

How Baby Boomers Became the ‘Wealthiest Generation That Ever Lived’

By: Adam Hardy | Editor: Julia Glum

Published: Oct 04, 2024 | 4 min read

Between now and 2045, an estimated \$84 trillion will be passed down to heirs. The bulk of those assets, more than \$53 trillion, will be transferred from baby boomers to their children. Those in the silent generation — between the ages of 78 to 96 years old this year — will transfer \$15.8 trillion.

GREAT WEALTH TRANSFER

Total wealth transferred through 2045

So c'mon team NZ. Let's get some of this capital come here. Delivering cross-border intergenerational **“Endless Summers”** for the owners of this huge capital horde.

All in the spirit of kaitiakitanga. For the generations yet to come.

PRESENTING NZ TO HNW AMERICAN BABY BOOM INVESTORS

With much of the film shot in New Zealand, by leveraging the evocative imagery of *The Endless Summer*, high-net-worth American Baby Boomers would be motivated to view overseas investments such as sanctuary properties / businesses in New Zealand as a way to fulfill their desire to recreate a more adventurous, diversified lifestyle.

- ❖ The film's themes of freedom, serenity, and connection to nature resonate with American Baby Boomers looking for a new chapter in life. New Zealand's natural beauty, political stability, and lifestyle offerings making it an ideal destination for both investment and personal rejuvenation.
- ❖ The imagery of an endless, carefree summer serves as the perfect metaphor for a second home or sanctuary that offers both personal fulfillment and financial security.

Here's how the imagery from *The Endless Summer* inspires this demographic to look toward sanctuary investing in New Zealand.



1. ESCAPE & FREEDOM

- **The Allure of an Unspoiled World:** *The Endless Summer* portrays an endless journey to untouched, beautiful destinations — with the surfers seeking perfect waves in far-flung locales such as New Zealand. This sense of escape and freedom mirrors what many Baby Boomers desire. A peaceful retreat away from the hustle and bustle of their former lives. By investing in sanctuary assets like second homes or businesses in places like New Zealand, they will experience a return to a more carefree, less stressful lifestyle.
- **Parallels with New Zealand:** Known for its stunning natural beauty, outdoor lifestyle, and laid-back vibe, New Zealand offers the ideal "Endless Summer" experience. One where Baby Boomers can live out their dreams of surfing, hiking, or simply enjoying the serenity of nature. The imagery of sun-soaked waves and wide-open spaces in the film mirrors the allure of New Zealand's coastlines and rural landscapes, offering a "sanctuary" escape.

2. ADVENTURE & EXPLORATION

- **A New Kind of Adventure:** In *The Endless Summer*, American surfers embarked on an epic adventure, seeking new horizons and experiencing different cultures. This sense of exploration and seeking something more meaningful in life now resonating once more with Baby Boomers looking for new experiences / lifestyle diversification as they approach or enter retirement. Many Baby Boomers may feel the need to break free from the confines of their established lives and rediscover adventure, whether that involves enjoying New Zealand's world-famous beaches or exploring the vibrant culture and lifestyle.
- **New Zealand as a Destination for Adventure:** New Zealand is synonymous with adventure tourism, offering everything from world-class surfing to bungee jumping, hiking, and scenic road trips. The imagery of endless adventure from *The Endless Summer* could entice Baby Boomers who want to reignite that sense of wanderlust and exploration in a safe, pristine environment, all while making a sound investment in a country known for its political stability and welcoming atmosphere.

3. TIMELSS SIMPLICITY AND SERENITY

- **A Return to Simplicity:** The film's timeless, carefree vibe and the surfers' search for peace and simplicity in their surroundings evoke a yearning for a simpler life. Many Baby Boomers, who may have spent years focusing on careers, raising families, and dealing with the stresses of modern life, are now looking for a serene, peaceful environment to retire in. *The Endless Summer* offers a visual metaphor for a life lived at a slower pace, in harmony with nature, free from the distractions and pressures of daily life.
- **New Zealand's Peaceful Way of Life:** New Zealand, with its low crime rate, stunning natural beauty, and relaxed lifestyle, offers Baby Boomers a chance to live in a pristine environment where the rhythms of life slow down, similar to the idyllic paradise portrayed in the film. This sense of tranquility and connection to nature is could be a powerful motivator for Baby Boomers to invest in second homes or vacation properties there.

4. SUSTAINABILITY & LEGACY

- **Investment as a Legacy:** In *The Endless Summer*, the surfers' journey is about creating lasting memories, and for many Baby Boomers, investment is about securing a legacy for future generations. The idea of owning property abroad, in a place like New Zealand, where they can pass down an idyllic sanctuary to their children or grandchildren, fits well into their desire to create something timeless and valuable for future generations.
- **New Zealand's Sustainable Development:** Baby Boomers are often highly concerned with sustainability and leaving a positive impact on the world. New Zealand's commitment to preserving its natural environment and promoting sustainable tourism and real estate practices can resonate with this mindset. For Baby Boomers looking for both a retreat and a responsible investment, New Zealand offers an ideal destination where they can feel good about their impact on the environment while enjoying a beautiful, natural setting.

5. A PLACE TO DISCONNECT & RECHARGE

- **The Desire to Disconnect:** The surfers in *The Endless Summer* are constantly searching for a place to get away from the noise and chaos of the world, connecting with nature and themselves. Many High-Net-Worth Baby Boomers, especially those who have worked in high-pressure careers, are drawn to the idea of a sanctuary asset abroad as a place to disconnect from the digital and business world and rediscover personal well-being.
- **New Zealand as a Sanctuary:** With its small, tight-knit communities and vast, unspoiled landscapes, New Zealand offers the perfect environment for Baby Boomers to step back from the demands of daily life and experience true peace and quiet. Whether by the beach or in the countryside, New Zealand offers the perfect "sanctuary" where Baby Boomers can spend quality time with family or find solace in solitude.

6. VISION OF ADVENTURE WITH STABILITY

- **Adventure with Security:** Baby Boomers often seek the balance of an exciting new chapter in life without sacrificing financial security or safety. *The Endless Summer* embodies the spirit of adventure but also the pursuit of something stable and rewarding. New Zealand is a politically stable country with a high standard of living, strong legal protections, and a safe environment, making it a desirable location for Baby Boomers seeking an exciting yet secure investment abroad.

DELIVERING US FINANCIAL & INTELLECTUAL CAPITAL TO NZ

(Bringing these benefits to Emerging Growth Companies in NZ)

The NZ Government is now actively promoting the country as a great destination for Foreign Direct Investment. Announcing the **NZD5M direct company investment link to residency**.

This is why we look to the American Baby Boomer who today controls **50% of the estimated USD82T in personal wealth in the USA**. A generation that culturally fits in New Zealand as American Baby Boomers easily assimilate into our society, making them natural investors in the country. Particularly in agribiz related assets and early stage business ventures as they bring a wealth of valuable business skills and experience that can significantly benefit the local economy.

These Baby Boomers have decades of experience in industries ranging from finance to marketing to entrepreneurship, and their expertise can be leveraged in a variety of ways bringing several key business skills and experiences to New Zealand when making such investments. For example:

1. ENTREPRENEURIAL EXPERIENCE

- **Starting and Scaling Businesses:** Many Baby Boomers have experience founding, growing, and scaling businesses. They can bring their deep knowledge of starting a company, developing a business plan, acquiring customers, and expanding operations. This experience is invaluable in New Zealand's startup ecosystem, which is thriving in industries like tech, agriculture, and tourism.
- **Business Mentorship:** Baby Boomers often have years of wisdom in navigating business challenges and can act as mentors to local entrepreneurs or younger business owners, helping them avoid common pitfalls and accelerate growth.

2. LEADERSHIP & MANAGEMENT

- **Team Leadership:** Baby Boomers often have extensive leadership experience, particularly in managing teams, departments, or entire companies. Their ability to foster a positive corporate culture, manage talent, and develop high-performing teams can benefit New Zealand businesses, particularly in leadership roles, consultancy, or mentorship programs.
- **Strategic Vision:** Having seen markets evolve and companies change, Baby Boomers often have strong strategic vision and the ability to foresee market trends, business needs, and long-term goals. This is crucial when it comes to business development and ensuring long-term success in any industry.

3. FINANCIAL ACUMEN

- **Financial Management:** Many Baby Boomers have a strong understanding of financial management, including budgeting, accounting, profit forecasting, and investment strategy. This is particularly useful for growing businesses or making sound investment decisions, especially in areas like real estate or export focused ventures.
- **Wealth Management and Investment:** With an understanding of managing large portfolios, Baby Boomers can assist in structuring investments for local businesses, helping them secure financing, manage risks, and maximize returns. Their knowledge of international financial markets and tax structures can help local businesses navigate foreign trading and investing.

4. MARKETING & SALES EXPERTISE

- **Brand Building and Marketing:** Baby Boomers often have extensive experience in traditional and digital marketing, having witnessed the transition from print and television advertising to the rise of digital platforms. Their ability to craft compelling brand strategies, identify target markets, and manage customer relationships can be invaluable for New Zealand businesses looking to expand internationally.
- **Sales Strategy:** Many Baby Boomers are skilled at developing sales strategies that resonate with both individual consumers and corporate clients. Their ability to build relationships, understand customer needs, and close high-value deals can be applied to any industry, particularly in export-driven sectors.

5. INTERNATIONAL BUSINESS KNOWLEDGE

- **Global Business Network:** Baby Boomers, particularly those with senior positions in multinational corporations or successful entrepreneurial ventures, often have a broad and valuable global business network. These connections can help New Zealand businesses establish partnerships, gain access to new markets, and attract foreign investment.
- **Cross-Cultural Experience:** Many Baby Boomers have worked in or with international markets. Their understanding of different business cultures, international regulations, and global market dynamics can help New Zealand companies expand globally, especially in industries like tourism, agriculture, and tech, which are heavily reliant on international trade.

6. INNOVATION & TECHNOLOGICAL INTEGRATION

- **Adapting to Technological Change:** Baby Boomers have experienced significant technological advancements throughout their careers, from the rise of computers to the internet and now the digital transformation. They are often adept at implementing new technologies, such as customer relationship management (CRM) tools, cloud computing, or data analytics, to improve business operations, customer service, and supply chain management.
- **Product Innovation:** Many Baby Boomers have been involved in product development and innovation, and their ability to bring new ideas to market can be a major asset for businesses in New Zealand. Their experience in improving processes, products, and services can help local businesses gain a competitive edge.

7. OPERATIONS & SUPPLY CHAIN MANAGEMENT

- **Efficient Operations:** Many Baby Boomers have spent years optimizing business operations, whether it's through streamlining production, reducing costs, or improving efficiency. This experience can be valuable for New Zealand companies looking to optimize their supply chains, especially in industries like agriculture, manufacturing, and export.
- **Logistics and Distribution:** Having been involved in large-scale operations, Baby Boomers understand the complexities of logistics and distribution networks, which is particularly relevant in a country like New Zealand with its isolated geographic position. Their expertise can help businesses optimize delivery times and reduce operational costs.

8. LEGAL & REGULATORY KNOWLEDGE

- **Navigating Legal Frameworks:** Many Baby Boomers bring experience in dealing with legal, regulatory, and compliance issues. This is especially valuable for businesses in highly regulated industries such as finance, healthcare, and real estate. They can assist in understanding New Zealand's regulatory environment and help businesses avoid legal pitfalls.
- **Contract Negotiation:** Baby Boomers, particularly those who have been involved in high-level business negotiations, possess the skill to negotiate favorable contracts, mergers, and acquisitions, which could be helpful for any New Zealand company looking to expand, enter partnerships, or invest in international markets.

9. HOSPITALITY & TOURISM INDUSTRY EXPERIENCE

- **Tourism and Hospitality Ventures:** Many Baby Boomers, particularly those with second homes or business investments, have experience in hospitality, whether it's managing hotels, restaurants, or other tourism-related ventures. New Zealand, a popular tourist destination, benefits from Baby Boomers' expertise in enhancing the guest experience, managing resorts, or establishing unique vacation properties.
- **Customer Service Excellence:** Baby Boomers who have spent time in the hospitality industry know the importance of customer service and can help local businesses understand the global expectations of inbound tourists, providing them with insights into how to attract and retain international visitors.

10. CORPORATE SOCIAL RESPONSIBILITY (CSR)

- **Sustainability and CSR Initiatives:** Many Baby Boomers are focused on responsible investing and corporate social responsibility. They bring an awareness of sustainable business practices and ethical investments. Their ability to develop and implement CSR strategies can align well with New Zealand's commitment to sustainability and environmental stewardship, particularly in sectors like agriculture, real estate, and tourism.

11. NETWORKING & COMMUNITY ENGAGEMENT

- **Building Local Connections:** When Baby Boomers invest in New Zealand, they bring a strong desire to connect with the local community. Their years of experience in building networks and relationships can be leveraged to create partnerships and enhance collaboration between local businesses, entrepreneurs, and international stakeholders.

THE SHOWCASE PROFILE



My name is Linda Brink. I am an American who upon return to Ft Lauderdale in Florida, will assume management control of our family’s 40+ year old FL realty brokerage firm, Good Service Realty Inc and its property portfolio. Within the portfolio is the realty firms supremely located, but rather “retro” office which inclusive of the going concern realty firm, values at USD520k. This is planned to form part of my family’s ownership stake in the Showcase upon completion of the capitalization structure.

Known as the “**Yachting Capital of the World,**” and the “**Venice of America**”, Fort Lauderdale enjoys a year-round tropical climate, beautiful azure waters, and miles of canals and waterways throughout the city. Long a mecca for yacht owners, this tropical destination on Florida’s Atlantic Coast is a beacon for yachtsmen and fishermen with its vibrant waterfront entertainment lifestyle. Soon to be the home of a Showcase that is to display and promote sanctuary lifestyle investments in New Zealand to Americans who have an interest in owning a “**sanctuary with a business**” in NZ, the world’s safest country.



Located just 500 yards from the causeway bridge where the intracoastal canal waterway ecosystem feeds into Port Everglades, second only to Miami as the largest cruise liner terminal in the USA, development in the area around the realty office has seen the value of properties in the area enjoy growth due to their proximity to the yachting precinct that has emerged on SE17th St as the entry gateway to a massive marina ecosystem.

CONCEPT SHOWCASE WINDOW ART ONLY

This window presentation will attract the attention of the baby-boomer generation

THE SHOWCASE OPERATIONS

(US Capital – Driving New Zealand’s Economic Growth)

RESIDENCY BY INVESTMENT (Golden Visas)



There are over 70 countries around the world offering Golden Visa programs. The most expensive appears to be one about to be launched for the entire Eurozone at €10M followed by Trump’s new USD5M offer with New Zealand coming in third at NZD5M (circa USD3M).

However, NZ’s Golden Visa (Active Investor Plus) program offers a clear pathway to both permanent residency and citizenship. In an increasingly troubled world, without doubt, the most attractive investor-visa program out there today in the safest country in the world.

FOREIGN DIRECT INVESTMENT

Key to attracting and launching American capital to come directly into New Zealand means getting in front of High Net Worth (HNW) individuals / families on their home turf and showing them all of the reasons why an investment in New Zealand is a logical step for those HNWI’s seeking to invest abroad to gain “Residency-By-Investment” in New Zealand. With 50% of the USD82T personal wealth pool in the US owned by the “**baby-boomer**” generation, promotional activity

must target this demographic because its unique natural resources deliver an “Endless Summer” lifestyle that millions of US baby-boomers nostalgically desire. This desire to be manifested into action through the use of evocative messaging that resonates with a US generation that has the capital and desire to recapture that nostalgia by moving to NZ where much of “**The Endless Summer**” was shot and where a sequel could be produced.

MESSAGING NEW ZEALAND AS AN “ENDLESS SUMMER” DESTINATION

Selling New Zealand as a destination to HNWI’s in the US will be achieved by way of an interfacing marketing presentation in the US. i.e.

- (1) Opening the “**Invest in NZ**” Showcase in Ft Lauderdale, the worlds “yachting capital”.

This we will do through opening a physical “Invest in NZ” Showcase in Ft Lauderdale that “lists” New Zealand wide investment opportunities directly to **(a)** walk-in traffic and **(b)** prospects reached through expanding into various distribution channels. Starting with the more than 1,000 yacht-clubs, their 600,000 plus, affluent members and circa 4,000 coastal marinas across the US. That’s just for starters!

- (2) Creating an intergenerational “**Endless Summer**” lifestyle between the US and NZ.

Licensed by the CA based film Corp that owns the IP to the evocative imagery from the iconic 1960’s movie “*The Endless Summer*” both the physical Showcase and all New Zealand investment products listed therein, will be marketed as delivering nostalgic “*Endless Summers*” to the baby-boom generation that the Showcase targets to invest in New Zealand.

THE SHOWCASE LAUNCH – CAPITALIZATION STEPS

NZ Showcase USA Inc was incorporated in Florida to own and operate the “Invest in NZ” Showcase in Ft Lauderdale. The capital formation/expansion structure was set up as follows with shares available to qualifying Wholesale / Accredited Investors in **80** parcels of **10,000 shares** priced at **USD0.60c** per share. **i.e. USD6k** per parcel.

(1) SHOWCASE DEVELOPMENT	160,000 SHARES ISSUED	
Founders (Brink family)	160,000 shares at USD0.625c each	USD100k

Development costs including intellectual property contribution to Showcase ecosystem development and operations in NZ and the US.

(2) SHOWCASE “SOFT LAUNCH”	400,000 SHARES TO BE ISSUED IN NZ	
(a) Anchor Sponsor-Owner	200,000 shares priced at USD0.60c each	USD120k

This person/party will head up the NZ Listing Sponsor program, procuring NZ investment product for Showcase Listing.

(b) NZ Shareholder Owners	200,000 shares priced at USD0.60c each	USD120k
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This block of shares is for NZ wholesale “Baby-Boomer Ambassadors” who support the objective of the Showcase in targeting American HNW Baby Boomers to invest in NZ.

(3) SHOWCASE “FULL LAUNCH”	400,000 SHARES TO BE ISSUED IN THE US	
US Showcase Sponsor-Owner	400,000 shares priced at USD0.60c each	USD240k

For issue to the US “Ambassador” who takes up the US Baby-Boomer investor marketing role.

(4) SHOWCASE TITLE TRANSFER	700,000 SHARES TO BE ISSUED IN THE US	
Brink Interests	700,000 shares at USD0.60c per share	USD420k

To be issued upon assignment of title in the property to the Showcase owner / operator company, NZ Showcase USA Inc.

ROI

All profits generated through the Showcase operations will be “passed-through” tax free at source in the US, back to all shareholders in direct proportion to their shareholding in the Corp.

Assuming that forecast “Invest in NZ” assumptions are met, the offer document indicates that a **US\$6k parcel will earn USD10,052 in year one**, delivering an ROI of 168%. Being subject to market conditions, this ROI is not warranted.

Details of the trading assumptions, ROI, forecast EPS etc are set out in the offer documents, These are available upon request only to qualifying parties to commence a **Due Diligence process**

SHOWCASE CAPITAL ENTRY

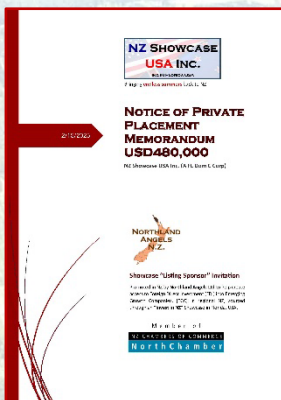
The following “Pitch Pack” documents have been prepared to support entry into the US Showcase company, “NZ Showcase USA Inc” a US Dom C, for profit Corp. Investment entry available only to qualifying parties. Docs available upon (a) request or (b) via <https://sanctumstay.us/showcase>



DOC-8218
Private Placement Memorandum



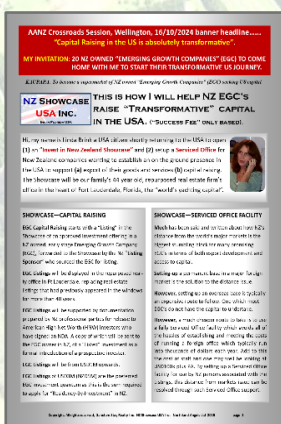
DOC-8100
2-Minute Pitch



DOC-9009
Notice of Private Placement



DOC-8095R
Residency-By-Investment



DOC-8090
US Serviced Office Invitation



DOC-3108
Investnz.us Briefing Paper



DOC-8100
Pitch Deck

ADDENDUM 1**UNDERSTANDING THE CHANGING US BABY BOOMER DEMOGRAPHIC**

In an ever changing socio-economic society, there is a growing trend among High-Net-Worth Baby Boomers in the U.S. who are increasingly looking to invest in second homes and businesses overseas as part of a diversified portfolio. This trend is driven by several factors of which the following are the most prevalent:

1. Desire for Sanctuary Investments

- **Political & Economic Uncertainty:** Many Baby Boomers are concerned about political instability, economic changes, or even potential tax increases in the U.S. This has led to an interest in purchasing second homes or businesses in countries with more stable political systems or favorable tax environments.
- **"Sanctuary" Investments:** These assets are seen as safe havens, offering a lifestyle retreat in uncertain times.

2. Global Diversification

- **Risk Mitigation:** High-net-worth individuals (HNWIs) are seeking to mitigate risks associated with economic downturns, political instability, or inflation by diversifying their investment portfolios across countries and regions. Owning property or businesses overseas allows them to spread their wealth and reduce exposure to risks specific to the U.S. economy.
- **Currency Diversification:** Investments in foreign real estate or businesses can provide exposure to different currencies, offering a hedge against U.S. dollar fluctuations.
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3. Retirement & Lifestyle Considerations

- **Retirement Locations:** Baby Boomers, many of whom are nearing retirement, are seeking locations where they can live comfortably in their later years. Countries with lower costs of living, better healthcare systems, or a desirable climate in a safe and secure location are becoming popular destinations for second homes.
- **Lifestyle Enhancements:** Investing in overseas properties, whether for personal use or as vacation rentals, provides an opportunity to live in a desired location while generating income or enhancing personal lifestyle.

4. Tax Benefits and Residency Programs

- **Favorable Tax Regimes:** Some countries offer tax incentives for foreign investors, which is a significant motivator for Baby Boomers looking to reduce their tax burdens. For example, countries like Monaco, the Cayman Islands, and Portugal have attractive tax policies for foreigners.
- **Golden Visa Programs:** Several countries, including Portugal, Spain, and Greece, offer "Golden Visa" programs, which grant residency or even citizenship to those who invest in real estate or businesses in these countries. These programs are particularly appealing to Baby Boomers seeking a second home and the added benefit of a European, Caribbean, Asian or a South Pacific region residency.

5. Business Opportunities and Foreign Investment

- **International Business Expansion:** Some Baby Boomers, particularly those who have owned businesses in the U.S., are looking for opportunities to invest in or expand

businesses overseas. Emerging markets in Asia, Latin America, and Eastern Europe offer significant growth potential, making them appealing for business investments.

- Retirement Business Ventures: Some Baby Boomers are not ready to fully retire and are looking to invest in businesses abroad, often in sectors like tourism, hospitality, food production / agriculture, where they can leverage their experience and create profitable ventures.

6. Property as an Investment Vehicle

- Real Estate Investment: Real estate remains a popular investment option, and many Baby Boomers see overseas property as a way to capitalize on global real estate markets. For example, real estate in popular tourist destinations or fast-growing cities overseas can provide rental income and long-term capital appreciation.
- Vacation Rentals: Some Baby Boomers are purchasing homes or apartments in popular vacation areas (e.g., the Caribbean, Costa Rica, Bali, or parts of Europe) and renting them out through platforms like Airbnb. This generates income while providing a retreat option.

The trend of American High-Net-Worth Baby Boomers investing in second homes and businesses overseas as part of a diversified portfolio is reportedly growing.

Largely driven by the desire for global diversification, tax benefits, favorable residency programs, and lifestyle improvements, these investments provide a way to safeguard wealth, generate income, and enhance personal or family living options in retirement.

As geopolitical and economic uncertainty increases, many Baby Boomers see international investments as a strategic way to secure their financial futures and personal wellbeing.

ADDENDUM 2

CONNECTING TO THE US BABY BOOMER DEMOGRAPHIC**PART 1 – NATIONAL GROUPS**

In addition to connecting with HNW baby boomer members of the more than 1,000 yacht clubs and circa 4,000 coastal marinas across America, there are a number of organizations in the USA that cater to Baby Boomers, providing a variety of social, educational, networking and recreational opportunities. Listed below are some of the better known ones which will be progressively brought into an inhouse, third party cloud hosted CRM data base app to support ongoing marketing of NZ investment products to this affluent community:

PRIMARY GROUPS**1. AARP (American Association of Retired Persons)**

- **Purpose:** AARP is one of the largest organizations for people over 50. It provides advocacy on issues like healthcare, social security, and retirement benefits, along with discounts, travel, and leisure activities.
- **Membership:** Over **38 million** members.
- **Focus:** Social services, policy advocacy, consumer discounts, networking and social events for older adults.

2. National Association of Baby Boomer Women (NABBW)

- **Purpose:** This organization specifically targets women in the Baby Boomer generation. It focuses on issues relevant to women in the later stages of their careers and life, such as retirement, caregiving, health, and self-discovery.
- **Membership:** Primarily women over 50.
- **Focus:** Empowering Baby Boomer women through education, events, and advocacy.

3. National Senior Games Association (NSGA)

- **Purpose:** A national organization that promotes senior sports and hosts the National Senior Games. This is ideal for Baby Boomers interested in physical fitness and competition.
- **Membership:** Older adults who participate in athletic events.
- **Focus:** Physical activity, sports, and fitness for seniors.

4. Boomerang

- **Purpose:** A social and community-based organization aimed at Baby Boomers, offering various events, local meetups, and online platforms for Boomers to connect.
- **Focus:** Socializing and networking for Baby Boomers.

5. Meetup Groups for Baby Boomers

- **Purpose:** Platforms like Meetup.com host a variety of social groups specifically for Baby Boomers, whether for fitness, book clubs, travel, or simply socializing.
- **Examples:** Local Baby Boomer hiking groups, book clubs, and travel groups.
- **Focus:** Socializing, finding new hobbies, and meeting like-minded people.

6. Boomer Generation Adventures (BGA)

- **Purpose:** This organization organizes travel, outdoor adventures, and cultural experiences specifically for Baby Boomers who want to explore the world.
- **Focus:** Travel, adventure, and cultural exploration.

Connecting with the Baby Boomer demographic (contd)

Addendum 2 (Contd)

SECONDARY GROUPS

(Part 1 contd)

7. Encore.org

- **Purpose:** This organization advocates for people aged 50 and older to engage in social causes through work, volunteering, and community projects. It connects Baby Boomers with opportunities for giving back.
- **Focus:** Social impact, volunteerism, and encore careers.

8. Senior Centers and Senior Citizens Clubs

- **Purpose:** Many local senior centers across the country host social clubs, activities, and meetups for older adults, including Baby Boomers. These centers offer everything from fitness classes and arts & crafts to support groups and games.
- **Examples:** YMCA senior programs, local community centers, and government-run senior clubs.
- **Focus:** Socialization, recreation, health, and lifelong learning.

9. The Retired Enlisted Association (TREA)

- **Purpose:** This is a nonprofit organization for retired enlisted military personnel, offering advocacy and a community for veterans, many of whom are Baby Boomers.
- **Membership:** Veterans, particularly retired military members.
- **Focus:** Veterans' rights, advocacy, and social events for retirees.

10. The National Council on Aging (NCOA)

- **Purpose:** The NCOA works to improve the lives of older adults by advocating for policies and services. It offers resources on health, finances, and living well.
- **Focus:** Advocacy, aging-related programs, and policy change.

11. Seniors4Hire

- **Purpose:** An organization designed to connect Baby Boomers and older adults with job opportunities, providing employment resources, career advice, and job listings.
- **Focus:** Career development, job searches, and professional networking.

PART 2 – INVESTOR GROUPS

There are several Baby Boomer investment clubs and groups across the United States that cater specifically to older adults, offering resources for investment education, networking, and financial planning. These clubs often focus on helping Baby Boomers with retirement planning, long-term wealth management, and safe investment strategies. Our US marketing strategy is to progressively reach out to these organizations and their members, bringing our “Invest in NZ” showcase activity to their notice. Below are some of the more widely known organizations:

1. The National Association of Investors Corporation (NAIC) / “BetterInvesting”

- **Purpose:** “BetterInvesting” is one of the largest organizations that help individual investors, including Baby Boomers, manage their investment portfolios. It provides educational tools, investment clubs, and resources to help people develop long-term, diversified investment strategies.
- **Membership:** Open to individuals and investment clubs.
- **Focus:** Stock investing, long-term wealth-building, and financial literacy.

2. American Association of Individual Investors (AAII)

- **Purpose:** AAI is a nonprofit organization that provides investment education and helps individual investors (including Baby Boomers) make informed investment decisions. They offer resources such as stock analysis tools, investment research, and a strong community of investors.
- **Membership:** Open to all investors.
- **Focus:** Stock investing, retirement planning, portfolio management, and financial education.

3. Senior Investment Clubs

- **Purpose:** Some senior centers and retirement communities offer investment clubs or financial discussion groups for Baby Boomers. These informal clubs allow members to pool their money for collective investing and discuss financial strategies in a relaxed environment.
- **Membership:** Typically open to older adults or retirees.
- **Focus:** Group investing, education on financial markets, and discussions about retirement finance.

4. The Motley Fool Investment Club

- **Purpose:** The Motley Fool, known for its investing advice, has local investment clubs that are often organized by members, including many Baby Boomers. These clubs follow the investment philosophy of long-term, diversified investing, often focusing on stock market strategies.
- **Membership:** Open to anyone who wants to join an investment club.
- **Focus:** Stock market education, long-term investing, and portfolio management.

5. CFA Society Local Investment Groups

- **Purpose:** While not specifically targeting Baby Boomers, many local chapters of the **CFA Institute** (Chartered Financial Analyst) host investment discussion groups that are beneficial for older investors looking to refine their strategies.
- **Membership:** Open to anyone, but typically more suited for experienced investors.
- **Focus:** Investment analysis, portfolio management, and advanced financial strategies.

Connecting with the Baby Boomer demographic (contd)
(Part 2 contd)

6. The Investment Club Network

- **Purpose:** This is a national network of investment clubs that provides Baby Boomers with the tools to start or join investment clubs. The network also offers educational resources, and members can learn about investing in stocks, mutual funds, and other investment vehicles.
- **Membership:** Open to individuals and groups.
- **Focus:** Collective investment strategies, stock market investing, and educational tools for Baby Boomers.

7. Retirement Investment Clubs

- **Purpose:** Some clubs focus specifically on retirement investing, offering a more tailored approach to managing retirement savings and making sound financial decisions for the later stages of life. These clubs often feature resources on annuities, bonds, and safe investment options.
- **Membership:** Typically for older adults or those planning for retirement.
- **Focus:** Retirement income, safe investing, and preserving wealth in retirement.

8. Smart Women Invest

- **Purpose:** This network of women investors, many of whom are Baby Boomers, provides educational opportunities and support for those looking to improve their investment strategies. Although it focuses on women, it can be a valuable resource for Baby Boomers seeking to understand financial markets and retirement planning.
- **Membership:** Primarily women, but open to anyone.
- **Focus:** Investment education, financial empowerment, and retirement planning.

9. National Investment Club Network (NICN)

- **Purpose:** NICN is a network that helps people form investment clubs, providing the structure and resources needed to build successful clubs. Many Baby Boomers use this platform to start or join investment groups focused on growing wealth and ensuring a financially secure retirement.
- **Membership:** Open to individuals and groups.
- **Focus:** Club management, group investing, and education.

10. Bogleheads® Investment Forums

- **Purpose:** While not a formal investment club, **Bogleheads®** is an online community inspired by the investing principles of John C. Bogle (founder of Vanguard). It's a great resource for Baby Boomers seeking simple, long-term investment strategies for retirement.
- **Membership:** Open to everyone, with a strong community of Baby Boomers.
- **Focus:** Index investing, retirement planning, low-cost investing strategies.

These clubs and groups offer various levels of involvement, from casual, educational discussions to more formal investment strategies. They deliver an environment in which Baby Boomers can engage with like-minded individuals, learn more about investing, and work together to grow their wealth.

OUR NZ INVESTMENT SHOWCASE IN FL.



Concept render only

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APPOINTMENTS OUTSTANDING

The following further appointments will be made as the capital round progress.

NZ Sponsor Group Director

NZ Sponsors appointee

NZ "Ambassador"

NZ Sponsors Appointee

US Sponsor Director

Linda to complete in US

OUR NZ INVESTMENT SHOWCASE IN FL.



<https://nZRural.farm>

<https://sanctumstay.com>

<https://goodservicerealty.us>

Linda Brink
Showcase Director



SANCTUARY INVESTING IN NEW ZEALAND

Due Diligence Introductory Notes Only

This document sets out a number of the issues that a US investor considering investing in a “Sanctuary” agribiz asset in New Zealand needs to undertake a study of as part of the investment consideration process.

Linda Brink – NZ Agribiz Sanctuary Purchase – “DD Guide”
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